

# Installation Checklist

Sage 300 Construction and Real Estate 18.1, 18.2, 18.3, and 18.4

Sage Document Management 18.1 and 18.2

## Notes about compatible versions:

- If you use third-party products that integrate with Sage 300 Construction and Real Estate, check with your software vendor prior to upgrading to ensure their product is fully compatible with this release. We do not support rolling Sage 300 Construction and Real Estate back to a previous version and do not recommend it.
- If you use Sage Estimating (Pervasive), **do not** upgrade to version 18. There is no compatible version of Sage Estimating (Pervasive) except for Australia (version 18.1.3). However, you can use Sage Estimating (SQL) with Sage 300 Construction and Real Estate version 18.
- If you use Sage Document Management, **do not** upgrade to version 18.3 or 18.4. There is no 18.3 or 18.4 version of Sage Document Management. You can run Document Management in a standalone environment; see [Knowledgebase article 91608](#) for more information.

Refer to chapter 1 of the [User's Guide](#) for more information about compatible versions.

Step	Description	Done
1	<p>Read the <a href="#">Important</a> document, <a href="#">Release Notes</a>, and the <a href="#">User's Guide</a> for important information regarding this version of Sage 300 Construction and Real Estate (including new requirements) and detailed installation instructions.</p> <p><b>Note:</b> If you plan to use a new server for Sage 300 Construction and Real Estate, migrate your programs and data (using the instructions in Chapter 3 of the <a href="#">User's Guide</a>) before upgrading to version 18.</p>	<input type="checkbox"/>
2	<p>Have your <b>Registration Name</b> and <b>Sage Client ID</b> (Account ID) handy. The ID is a 10-digit number that starts with 4. Also review the number of uses your company has purchased for each application by logging onto the <a href="#">Sage Customer Portal</a>; see <a href="#">Knowledgebase article 87017</a> for more information. If you need to purchase additional uses, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com).</p>	<input type="checkbox"/>
3	<p><b>Document Management users:</b> During the version 18.1 or 18.2 Accounting installation, AP invoice batches that are in the Document Management Scan queue will be locked. These batches are then automatically moved from the Scan queue to DocuVault during the installation of DocuVault. If you want to send these batches to an Inbox prior to the upgrade, you must complete that action before installing Sage 300 Construction and Real Estate. Review the <a href="#">Document Management User's Guide</a> for additional information about Document Management.</p>	<input type="checkbox"/>
4	<p>If you are upgrading from an earlier version:</p> <ul style="list-style-type: none"><li>• Create a complete backup of all data and program files for Sage 300 Construction and Real Estate and Document Management.</li><li>• Run File Doctor on all files. Even if you do not receive a corrupt file message, there may be issues File Doctor finds that it will not be able to fix after upgrading to version 18.</li></ul>	<input type="checkbox"/>
5	<p>Make sure that you install the appropriate operating system and service pack before you install Sage 300 Construction and Real Estate. See the <a href="#">System Requirements article in the Sage Knowledgebase</a> for more information.</p>	<input type="checkbox"/>

Step	Description	Done
6	Make sure that your server and workstations meet all other hardware and software requirements, including sufficient hard disk space for program and data files. See the <a href="#">System Requirements article in the Sage Knowledgebase</a> for more information.	<input type="checkbox"/>
7	Make sure that you have full control of the required folders, files, and registry keys on your file server, terminal server, and workstations that will have Sage 300 Construction and Real Estate installed. For a list of these for your operating system, see "Privilege settings required for installation and use" in Chapter 1 of the <a href="#">User's Guide</a> .	<input type="checkbox"/>
8	Quit all programs and services for the duration of the installation. This includes programs that may be running in the background, such as antivirus, email, and backup programs.	<input type="checkbox"/>
9	If you are running Windows 7 or Windows Server 2008, elevate your permissions. See "Before You Install" in Chapter 2 of the <a href="#">User's Guide</a> for more information.	<input type="checkbox"/>
10	Verify the upgrade path; see "Supported upgrade paths" in Chapter 1 of the <a href="#">User's Guide</a> . If you are upgrading from an older version, you may need to install several versions to become current.	<input type="checkbox"/>
11	<b>Document Management users:</b> Verify the upgrade path; see "Upgrade Path" in Chapter 1 of the <a href="#">Document Management User's Guide</a> . <b>Do not</b> upgrade to Sage 300 Construction and Real Estate version 18.3 or 18.4 unless you plan to run Document Management in a standalone environment; see <a href="#">Knowledgebase article 91608</a> .	<input type="checkbox"/>
12	If you use Accounting, install Sage 300 Construction and Real Estate version 18 on the server. See Chapter 2 of the <a href="#">User's Guide</a> for instructions. Be aware that the installation process may restart your server several times.	<input type="checkbox"/>
14	After you install Sage 300 Construction and Real Estate version 18, restart the server, and log in as the same user that installed the software. Open the software and wait until the configuration process is completed.	<input type="checkbox"/>
15	If you use Purchasing, Inventory, or Service Management and your company data folder is inside the <b>Programs Files</b> folder, move your data to a shared location.	<input type="checkbox"/>
16	Install Sage 300 Construction and Real Estate version 18 on the workstations. Be aware that the installation process may restart the workstations several times. See Chapter 2 of the <a href="#">User's Guide</a> for instructions. <b>Tip:</b> If you have a large number of workstations, you can use a script to silently install the software on client workstations. For more information, see <a href="#">Knowledgebase article KB 83952</a> .	<input type="checkbox"/>
19	<b>Document Management users:</b> Install DocuVault on the server that contains or will contain your DocuVault.	<input type="checkbox"/>
20	<b>Document Management users:</b> Install Document Management on the server and then on the workstations. See the <a href="#">Document Management User's Guide</a> for instructions. Be aware that the installation process may restart your server and workstations several times.	<input type="checkbox"/>
21	Open and upgrade your company data folders.	<input type="checkbox"/>

Step	Description	Done
22	If you plan to run Sage SQL Replicator, use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data. See the <a href="#"><u>Sage SQL Replicator Setup Guide</u></a> for instructions.	<input type="checkbox"/>
23	Restart all programs and services that you shut down for the installation.	<input type="checkbox"/>